"There used to be a major reason to leave this town. I don't believe that's true anymore. . .There was a lack of sophistication. . .that has changed and now we're finding a readiness to work with local agencies. . ."

— Tom McElligott, founder, Fallon McElligott Rice

"One of my goals is to increase the creative reputation of the agency. I've worked real hard on that since I've been here. . ."

— William Dunlap, new chairman, Campbell-Mithun

Hot agencies sparking new Twin Cities interest

By M. HOWARD GELFAND

MINNEAPOLIS—If you're talking visibility in the Twin Cities advertising community, 1983 has been the year of Fallon McElligott Rice.

While many of its competitors were quietly recovering from the recession, the upstart agency, now in its third year, was grabbing attention, awards and accounts.

Yet there's been plenty of other activity in the Twin Cities lately—activity the Fallon McElligott Rice phenomenon at once underscores and obscures.

Only a decade ago, many outsiders viewed the Twin Cities as a two-agency town: Campbell-Mithun and Everyone Else. Business was leaving for larger New York and Chicago.

No more. Many accounts are leaving home for the Twin Cities these days. The success of Fallon McElligott Rice, already claiming billings of $18 million, helps illustrate the area's continuing emergence as a creative and financial spot on the advertising globe.

At the same time, the attention given to FMR shadows the accomplishments of the more established agencies here.

Says Tom McElligott, the leading creative force behind the agency: "There used to be a major reason to leave this town. I don't believe that's true anymore. Ten years ago, there was a lack of sophistication here. People here didn't understand how to

(Continued on Page 57)

'U.S. News' mulls offer for its purchase

By RICHARD L. GORDON

WASHINGTON—Future ownership of U.S. News & World Report Inc. is up in the air as management of the nation's No. 3 newsweekly ponders a big-dollar purchase offer from an undisclosed bidder.

The bid for control of the 50-year-old company—employe-owned since 1962—was confirmed by company president James H. McIlhenny last week. He refused to identify the bidder, and one likely candidate—real estate millionaire Mortimer Zuckerman, chairman of *Atlantic Monthly*—claimed he is not involved.

Mr. McIlhenny said employes will get more information "as early as possible," but he said, "We're not anywhere near any significant next step."

No single *U.S. News* employe owns a significant block of stock in the company, and the greatest number of shares are held in trust for employes in the company's profit-sharing fund, a staffer said.

U.S. News & World Report president McIlhenny refused to discuss the number of shares outstanding, or identify the profit-sharing fund trustees who can vote those shares.

Employes were told in a memo only that the offered price for the company is "significantly above its appraised value."

Staffers put the current value at $420 a share. There were rumors that the offering price could be as much as four to five times the company's book value.

"We intend to conduct ourselves completely in the best interest of our employes," Mr. McIlhenny said. He indicated there has been interest from other would-be purchasers over the years. "There's a difference between idle conversation and an offer," he added. "This is an offer."

There was immediate speculation about a Zuckerman connection to *U.S. News* because he and the company are already partners in a $200 million office building.

(Continued on Page 55)

world news roundup

TORONTO—Thomson Newspapers and Southam Inc., Canada's largest newspaper chains, were found not guilty by the Ontario Supreme Court on Dec. 9 of "conspiracy to lessen competition unduly." The trial began last September and stemmed from 1980 closures of one Thomson and one Southam newspaper, giving each a local monopoly.

NEW YORK—Grey Advertising is renaming all of its foreign offices "Grey Advertising" or "Grey (country or city name)."

CHICAGO—Leaf Inc., the new U.S. arm of Helsinki-based Huhtamaki Group, plans to break new tv and print ads by February for recently acquired Good & Plenty, Clark and Milk Duds candies, which will receive increased ad budgets via N W Ayer. Next year it will also launch its first U.S. corporate ad campaign via Ayer.

PARIS—Benton & Bowles' French agency will sell its 20% stake in French agency group GRP to Feldman Calleux Associes next month.

LONDON—Alberto-Culver Co. is consolidating its $4.5 million U.K. account at English agency MWK&P—its fourth agency in two years. The haircare marketer fired Abbott Mead Vickers/SMS last June and has not officially had an agency since then.

TOKYO—Japanese publisher Kyoikusha last week launched the first issue of its heavily promoted business magazine "Common Sense." The magazine has a no-ad policy.

LONDON—Rupert Murdoch's Satellite Television, set for a major expansion in 1984, has been renamed Sky Channel, and will start beaming programs to three British cable operators near London in Jan-

(Continued on Page 30)

Low-alcohol beers on tap

By ROBERT REED

A rash of low-alcohol beers is expected to hit the market next year as brewers try to thwart declining sales and find a way to address the public's growing concern about alcohol abuse.

Already, two regional brewers have introduced low-alcohol brews, and most of the major beer makers are "looking into" the category and formulating test plans, sources say.

These beers have less than 2% alcohol by weight, less than those of regular brews, which range from 3.6% to 4% in alcohol content.

C. Schmidt Brewing Co., Philadelphia, entered last week with its Break Special Lager, and in September, Cincinnati-based Hudepohl Brewing Co. premiered Pace beer.

Of the major players, No. 1 Anheuser-Busch, already set to bring out a number of new products in 1984, is going to introduce a low-alcohol beer next year, competitors say (AA, Dec. 12).

Stroh Brewery Co. and G. Heileman Brewing Co. executives say they are examining the possibility, while Miller Brewing Co. is "looking at the category but not seriously looking," according to a company spokesman.

Robert Rechholtz, exec vp-marketing for Adolph Coors Co., says the segment is "the natural evolution of the light beer market," (which now garners about 20% of beer sales) and is in line with the American consumer's move to moderation of drink and diet.

Mr. Rechholtz declined to say if Coors also is working on a low-alcohol entry.

But when A-B does come to the fore, it is likely the others will follow, analysts say. The brewing industry is approaching a new-product explosion, and each brewer is attempting to offset flat or declining sales by creating new market niches such as low-alcohol or even flavored beers.

"To give the [low-alcohol] segment credibility, a big brewer will have to come up with it," says Bob Pohl, exec vp-general manager of Hudepohl.

"The others [larger brewers] will follow," says William Elliott, president of Schmidt. "A lot of extra brewing capacity out there has to be filled."

Mr. Elliott added that the low-al-

(Continued on Page 55)

AA's Washington bureau relocates in Press Bldg.

Effective Dec. 19, the Washington bureau address for ADVERTISING AGE is Suite 814, National Press Bldg., Washington, D.C. 20045. The new phone number is (202) 662-7200.

Ad spending seen climbing 13.8%

By CHRISTY MARSHALL

NEW YORK—Advertising spending will be up 13.8% to $85.4 billion in 1984, according to Robert Coen, senior vp-media of McCann-Erickson.

Speaking at the annual Paine Webber Media Outlook Conference, Mr. Coen reported that in '83 ad spending totaled $75.1 billion, 12.5% more than in '82.

"Advertising spending in 1983 was stronger than many of us predicted a year ago when we were expecting a slow and delayed economic recovery," Mr. Coen said. Earlier this year, he estimated national broadcast would be up 11%, national print 8% and other national 10%. In reality, all three areas were up 12%.

"A year ago, we didn't think consumers would start spending until after the tax cut in the middle of the year," Mr. Coen said. "However, they didn't wait and they came out much stronger and faster t' we expected; '83 has really been a very good year."

Looking forward to 1984, the McCann executive said national broadcast would be up 13% to $15.2 billion.

Of that, network tv would increase by 12% to 13%, spot tv will be up 13%, radio (network and spot) would be up 12% to 14% and cable advertising would be up 20% to 30%. National print (magazine and national advertisers in newspapers) will be up 14% to $7.8 billion. Other national spending will be up 14% to $24.9 million. For the grand total, the media outlook for 1984 tallies out to a 13.8% increase to $85.4 billion.

The biggest gain in spending this year was enjoyed by the direct-mail industry; spending was up 14% from '82 to $11.8 billion. Magazines were a close second with a 13.5% increase, attributable primarily to increased buys from automobile and cigaret advertisers, Mr. Coen said.

Network tv advertising was up 12.5% to $7 billion; radio grew 12% to $1.3 billion; spot tv increased 10.5% to $4.8 billion; newspapers were up 9.5% to $2.7 billion, and other media climbed 9.4% to $10.4 billion.

For the total ad picture, local newspaper increased 14.5% to $17.4 billion, local tv was up 14% to $4.3 billion

(Continued on Page 56)

The outlook for 1984

	Change over '83 (%)	Millions of dollars
National		
Broadcast	13.0	15,205
Print	14.0	7,835
Other	14.0	24,890
Total	13.5	47,930
Local	14.2	37,470
Grand total	13.8	85,400

Source: Robert Coen, McCann-Erickson

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CARNATION CO.	KIKKOMAN	SEAGRAM'S
COCA COLA FOODS	KRAFT	G.D. SEARLE
CORNING	KREUSCH WINE	SOUTHERN COMFORT
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U.S. shifts ad account policy

WASHINGTON—A new top-level government strategy has been approved to see that chunks of the government's big ad accounts are channeled to minority-owned ad agencies and agency suppliers.

At the same time, the new policy opens the way for agencies holding major government accounts to get longer contract periods without renewal competitions.

The new directive was issued by the White House office of federal procurement policy, part of the White House office of management and budget.

Under the plan, which became effective last week, agencies holding major government accounts will be called in twice a year by White House purchasing policy officials to review their subcontracting programs.

Discarded in the new Reagan strategy is a controversial Carter administration policy requiring that ad agencies have a chance to compete for the government's major accounts every three years.

The American Assn. of Advertising Agencies had protested that the mandatory competition every three years was wasteful and artificial, and it discouraged top ad agencies from pitching for government accounts (AA, Jan. 25, '82).

That change is most important in military recruiting, which accounts for about three-quarters of the government's $200 million ad spending.

While the Air Force already uses five-year contracts, the Army, Navy, Marine Corps and joint-service ad programs have stayed with the three-year contracts that are objectionable to the Four A's.

A 1978 federal law requires holders of government contracts worth $500,000 or more to develop subcontracting plans aimed at minority companies. In one such agency plan, Army agency N W Ayer has targeted 9% of its subcontracted business for minorities, a Pentagon purchasing official said last week.

The new policy represents a trade-off for ad agencies holding government contracts. The closer inspection of subcontracting performance by a new layer of reviewing officials means more paperwork. But the longer contract periods mean fewer renewal competitions.

In theory, the three-year competition cycle was meant to prevent agencies from locking up choice government accounts under long-term contracts. With more opportunities to bid, minority companies stood a better chance, the argument went.

In practice, fewer agencies have been willing to go to the expense of competing for the biggest government accounts. Even where there is competition, incumbents rarely have lost an account. Even without serious competition, the incumbent must go through the cost of pitching the business.

Growing impatience with the system led the Four A's to begin lobbying the Reagan administration nearly two years ago. The organization's proposal, which split Defense Department ad executives, called for extending the government ad agency contract to a maximum of nine years. Pentagon executives later told the White House they supported a switch to a five-year maximum.#

Merged cable networks set launch

By MORRIE GELMAN

ANAHEIM—The cable tv shakeout continues as the Entertainment Channel joins with ARTS to become an advertiser and cable system-supported service on Feb. 1, and Spotlight pay cable service ends on the same date.

The new service is to be known as the ARTS & Entertainment Network, or simply A&E. Hearst Corp., ABC Video Enterprises and RCA Cable each will own one-third of the cable network.

The Entertainment Channel, which folded March 31 after less than a year of operation and with less than 50,000 subscribers, was a joint venture of RCA and Rockefeller Center. The latter holds an interest in RCA Cable.

Advertising, as it is with the Hearst/ABC Video Enterprises ARTS service, will be a key source of financial support for what will be a basic cable service when the Entertainment Channel is added.

A president and key officers of the new A&E company, which will be based in New York, still are to be selected.

As A&E comes on as another high-profile attempt to tap the cable audience, Spotlight becomes another high-visibility dropout.

The service has been managed by Times Mirror Satellite Programming since May, 1981, and is owned by four major cable companies—Cox Cable Communications, Storer Communications, Tele-Communications Inc. and Times Mirror Cable Television.

After folding its around-the-clock pay cable movie service Feb. 1, Spotlight's assets will be acquired by Showtime/The Movie Channel, giving these services an opportunity to close the wide gap that Home Box Office has opened in the pay tv competition.

Showtime/The Movie Channel, which operates as a separate 24-hour-a-day pay tv service, has more than 7 million subscribers.

It was imperative for Spotlight, if it was to compete in the marketplace, to market itself outside the cable systems of its four partners.#

Ogilvy hands over reins

NEW YORK—David Ogilvy, founder of Ogilvy & Mather and its worldwide creative guru, officially passed the torch last week to Norman Berry, creative director of O&M's office here.

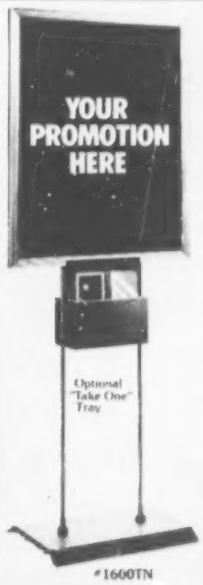
Mr. Ogilvy had been creative head of Ogilvy & Mather Worldwide. At the age of 72, he announced it was time for a successor.

"For 10 years, I have functioned as creative head of OMW at the international level," Mr. Ogilvy said. "The time has now come to give this impossible job to someone a bit younger.

"I nominate Norman Berry, provided he can also continue as head of New York, where he is indispensable. Norman has a genius for leading creative people. He is a glutton for hard work. His enormous experience here and in Europe is matched only by his monumental common sense."

Mr. Berry, 52, founded Davidson, Pearce, Berry, Spottiswoode, London, now a subsidiary of Ogilvy & Mather. He joined O&M in mid-1979 and now sits on the board and the O&M executive committee.

The news of the Berry ascension came last Thursday morning as the entire agency staff was getting ready for the agency's annual Christmas fete that includes a Broadway matinee. This year it was off to the Shubert Theatre to see "A Chorus Line."#



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corrections & clarifications

- Direct marketing in Japan grew from 0.6% of all sales in 1980 to 0.8% in 1932 (AA, Nov. 28, P. M-32).
- Kentucky Fried Chicken Corp. currently operates nine restaurants in West Germany. An earlier article incorrectly reported that number (AA, Nov. 28, P. 58).
- Bacardi Imports, Miami, is a licensee of Bacardi & Co. Ltd., which owns the Bacardi trademark (AA, Nov. 21, P. 4). In addition, the same article should have noted that Bacardi Imports discontinued marketing Terry brandy.
- East/West Network incorrectly reported its November, 1983, and 1983 year-to-date figures for 10 publications (AA, Nov. 21, P. 55). The correct figures, respectively, are as follows: *Amtrak Express*, 49.5-470.0; *Continental*, 69.2-720.3; *Eastern Review*, 134.3-1,147.5; *Ozark*, 54.7-514.2; *PSA Magazine*, 110.3-1,008.7; *Republic Scene*, 84.0-650.9; *United*, 130.0-1,079.4; *US Air*, 74.0-705.4; *Western's World*, 85.3-699.6; *Pan Am Clipper*, 47.8-470.9.

ad linage

Advertising pages for U.S., Canadian, and foreign consumer publications—*December*

	Current month 1983	Current month 1982	Year-to-date 1983	Year-to-date 1982
— Art & antiques —				
American Artist	55.0	48.0	779.0	860.0
Antiques	113.3	119.0	1,558.9	1,726.9
Art in America (11X)	125.0	91.8	1,314.3	1,154.3
Plate World	76.0	112.0	494.0	332.0
Portfolio (6X)	—	71.3	266.5	368.8
Southwest Art	104.9	82.5	1,129.8	1,289.2
Total Group	**474.2**	**524.6**	**5,542.5**	**5,831.2**
% change		**-9.6%**		**+0.2%**
— Auto/cycle/rec. vehicles —				
AutoWeek	104.2	106.8	1,474.0	1,589.0
Car & Driver	124.2	105.7	1,122.8	1,013.0
Car Collector & Car Classics	27.4	25.6	264.3	274.1
Car Craft	67.0	57.7	858.6	875.5
Cycle	37.1	47.0	684.4	851.5
Cycle Guide	21.8	32.4	482.0	581.4
Cycle World	28.4	34.9	584.6	663.2
Dune Buggies & Hot VWs	84.1	58.8	875.2	670.4
Family Motor Coaching	91.0	86.4	1,369.5	1,146.6
4 Wheel & Offroad	63.8	62.2	806.1	613.1
Four Wheeler	66.3	31.8	544.7	331.7
Hot Rod	60.5	45.8	683.0	672.3
Motorcyclist	15.9	25.4	416.5	560.2
Motor Trend	80.1	57.9	787.4	696.3
Motorhome	73.3	—	875.9	648.9
Pickup, Van & 4 WD	29.9	23.8	300.2	320.8
Road & Track	115.2	111.2	1,207.4	1,133.7
3 Wheeling	30.4	25.8	337.4	273.0
Trailer Life	106.5	90.5	1,287.2	1,245.1
Total Group	**1,227.1**	**1,029.7**	**14,961.2**	**14,159.8**
% change		**+19.1%**		**+5.8%**
— Boating & yachting —				
Boating	88.9	73.2	1,341.6	1,259.8
Chesapeake Bay	18.3	15.5	324.4	313.3
Cruising World	110.2	83.0	1,731.6	1,543.5
Lakeland Boating	31.5	29.0	497.5	489.5
Motor Boating & Sailing	100.4	86.5	1,599.0	1,434.0
Sail	83.1	63.9	1,415.2	1,550.8
Sea & Pacific Skipper	47.2	64.5	768.7	859.0
Small Boat Journal (5X)	31.6	27.7	226.8	200.3
Trailer Boats	—	—	248.3	249.4
Western Boatman (6X)	—	—	114.3	—
Yachting	126.1	116.1	1,800.3	1,912.4
Total Group	**637.3**	**559.4**	**10,067.7**	**9,812.0**
% change		**+13.9%**		**+2.6%**
— Canadian —				
L'Actualite	79.5	62.7	687.9	663.4
Chatelaine				
English Edition A	97.0	92.4	1,182.1	1,158.7
French Edition	95.9	83.8	1,061.1	941.8
City Woman (5X)	62.2	—	206.1	157.0
Equinox	—	—	243.5	163.4
Financial Post Magazine A	37.0	27.1	402.1	464.0
Flare A	58.3	40.3	624.2	574.5
Homemaker's Magazine	85.5	87.4	926.7	902.9
Madam Au Foyer	64.0	68.3	724.6	680.3
Macleans A (52X)	118.9	75.3	1,218.0	1,288.7
Quest Magazine (8X) A	41.6	51.5	396.4	446.5
Reader's Digest				
Canadian-English A	90.7	100.1	983.8	1,009.4
Canadian-French A	80.0	83.3	903.7	954.8
Toronto Life	159.3	157.4	1,150.3	1,215.5
Vancouver	112.2	119.6	999.6	1,031.9
Total Group	**1,182.1**	**1,049.2**	**11,710.1**	**11,652.8**
% change		**+12.6%**		**+0.4%**
— Civic/fraternal —				
American Legion	18.7	19.0	323.9	57.7
Elks Magazine (10X)	—	—	251.7	242.2
Kiwanis Magazine	—	—	150.3	135.1
Lion (10X)	6.0	5.5	81.3	80.3
Moose Magazine	18.0	18.0	213.0	229.0
Rotarian	10.6	9.5	162.3	165.1
V F W (10X)	11.0	—	323.0	279.5
Total Group	**84.3**	**52.0**	**1,505.5**	**1,488.9**
% change		**+23.6%**		**+1.1%**
— Comics —				
Archie Comic Group (6X)	10.0	10.0	60.0	60.0
DC Comics	9.0	10.0	96.0	90.0
Marvel Comics Group	10.0	10.0	118.0	119.5
Total Group	**29.0**	**30.0**	**274.0**	**269.5**
% change		**-3.3%**		**+1.8%**
— General —				
American Forests	7.3	12.3	115.4	133.3
American Health (6X)	54.3	36.3	244.0	143.0
American West (6X)	—	—	150.7	174.5
The Atlantic A	45.3	34.2	522.2	373.3
Audubon Magazine (6X)	—	—	217.7	190.0
Bon Appetit A	123.8	94.7	994.8	1,017.5
Changing Times	47.8	31.7	510.9	438.9
Cuisine Magazine	65.0	52.5	522.9	460.9
Ebony	86.8	82.3	1,049.9	979.9
Fifty Plus	23.5	20.8	315.5	330.9
Food & Wine	50.0	66.6	470.1	413.4
Games	29.9	32.8	329.9	238.3
Geo	37.8	22.5	336.9	212.9
Gourmet	118.8	100.0	931.8	842.6
Home Entertainment (6X)	—	—	21.4	—
Harper's Magazine A	25.4	15.1	219.3	210.5
Life	86.4	84.5	733.6	622.9
Modern Maturity (5X)	25.2	29.5	235.4	192.0
Money	151.8	123.3	1,429.9	1,332.4
Moneysworth (4X)	—	—	72.1	132.1
Mother Earth News (6X)	40.3	44.1	307.8	301.9
Mother Jones (10X)	17.0	12.7	159.9	136.7
Museum (6X)	—	—	—	—
National Geographic	26.3	22.4	282.7	259.3
Natural History	38.4	33.0	466.9	386.8
Prevention	58.2	70.0	909.2	849.0
Psychology Today	21.2	25.5	307.6	392.5
Reader's Digest A	108.9	95.6	1,032.9	1,093.0
Saturday Evening Post (9X)	35.5	42.2	380.4	393.2
Signature	40.6	40.9	659.8	616.4
Smithsonian	85.2	76.0	938.5	934.9
Success	34.8	27.7	413.6	349.4
Town & Country	211.9	188.5	1,814.3	1,716.9
Travel/Holiday	24.5	25.8	472.9	523.5
Travel & Leisure	101.2	102.8	1,090.2	1,116.6
Vanity Fair	37.9	—	513.8	—
Video	84.7	72.3	770.1	702.1
Video Review	78.3	78.8	779.2	743.7
Writers Digest	24.6	21.8	312.3	265.6
Yankee	86.6	80.0	1,049.7	1,030.6
Total Group	**2,135.2**	**1,899.2**	**22,286.2**	**20,251.4**
% change		**+12.4%**		**+10.0%**
— Home —				
Americana (6X)	—	—	212.5	201.1
Architectural Digest A	144.3	159.5	1,566.0	1,614.3
Better Homes and Gardens	131.8	96.1	1,353.0	1,335.5
Colonial Homes (6X)	77.8	80.1	384.7	401.9
Country Journal	36.9	36.7	531.3	546.4
Country Living	47.1	28.5	631.7	420.2
Dallas/Ft. Worth				
Home & Garden	83.8	80.0	844.3	711.4
Early American Life (6X)	—	—	167.1	178.7
Family Food Garden (6X)	—	—	319.9	254.3
Family Handyman (10X) A	49.5	42.3	715.9	683.1
Flower & Garden (6X)	37.3	40.0	234.1	263.6
Home	32.8	18.3	456.2	314.6
The Homeowner (6X)	—	—	166.9	147.9
Horticulture	21.5	27.3	287.0	296.0
House Beautiful	91.3	85.5	1,081.5	956.2
House & Garden	99.9	42.5	826.1	965.3
Houston Home/Garden	130.2	129.7	1,281.9	1,383.7
Metropolitan Home	75.5	61.4	729.9	801.1
New Shelter (9X)	—	—	443.0	390.5
1001 Home Ideas	26.3	20.3	401.2	311.1
Organic Gardening	63.8	69.1	839.5	813.8
Phoenix Home/Garden	57.0	50.3	582.4	582.3
San Diego Home/Garden	71.1	71.7	814.8	686.2
Southern Accents (4X)	—	—	310.6	320.3
Southern Living	118.4	114.4	1,543.2	1,493.8
Sunset Magazine A	125.3	131.1	1,698.8	1,640.0
Texas Homes	86.2	74.1	887.1	934.8
Workbench (6X)	—	—	396.4	385.7
Total Group	**1,601.8**	**1,458.9**	**19,707.0**	**19,033.8**
% change		**+9.7%**		**+3.5%**
— In-flight & other passenger —				
Aboard Group (7) (4X)	—	—	102.5	157.3
Alaskafest	43.8	44.7	561.7	513.1
American Way	93.4	74.5	1,122.9	954.9
East/West Network				
Amtrak Express	31.7	32.0	501.7	461.0
Continental	—	48.3	720.3	646.4
Eastern Review	102.2	69.8	1,249.7	956.0
Ozark	37.5	34.5	551.7	499.3
PSA Magazine	90.5	76.0	1,099.2	1,003.6
Pan Am Clipper	35.3	44.3	506.2	479.1
Republic Scene	50.5	37.7	701.4	300.8
United	83.2	72.0	1,162.6	914.5
USAir	55.8	43.3	761.2	573.4
Western's World	62.2	53.7	761.8	299.3
Halsey Publications				
Air Cal	40.0	—	485.5	—
Delta Sky	64.0	52.2	800.3	635.1
Skylite	19.2	—	222.0	88.6
Hawaii	22.1	18.5	211.2	235.2
Pace (6X)	—	—	257.5	198.9
Spirit of Aloha	22.6	20.5	209.5	234.1
Southwest Airlines	89.8	84.0	1,169.9	1,146.8
Webb Publications				
Frontier	31.2	35.0	421.8	460.7
Northwest Orient	29.3	33.5	459.3	355.4
TWA Ambassador	45.3	35.7	652.2	565.9
Total Group	**1,049.6**	**910.2**	**14,692.1**	**11,679.4**
% change		**+15.3%**		**+25.7%**
— Men's —				
Esquire	291.2	101.8	1,312.3	807.2
Firehouse Magazine D	47.2	42.0	651.5	603.3
Gentlemen's Quarterly A	146.4	136.0	1,452.5	1,340.0
Penthouse A	92.4	70.1	711.9	715.6
Playboy A	126.3	116.4	1,025.2	1,204.8
Total Group	**703.5**	**466.3**	**5,153.4**	**4,670.9**
% change		**+50.8%**		**+10.3%**
— Metropolitan —				
Aloha (6X)	25.2	42.7	185.3	181.3
Atlanta	70.4	76.3	892.5	801.5
Baltimore	101.4	93.8	756.1	751.6
Boston	176.9	167.3	1,629.5	1,603.9
California	70.9	99.2	797.4	872.0
California Living	68.8	94.0	718.8	829.6
Charlotte (10X)	24.7	25.3	318.6	224.6
Chicago	217.5	190.3	1,766.1	1,748.6
Chicago's North Shore	111.7	83.9	1,026.9	867.0
Cincinnati	60.7	55.8	669.9	697.4
Cleveland	139.6	84.3	952.4	795.0
Coast (38X)	79.0	80.0	2,990.2	2,808.0
Columbus Monthly	81.9	75.8	876.9	893.5
Commonwealth	43.9	41.9	370.9	708.4
Connecticut	84.2	72.7	906.9	893.7
Country Magazine	35.3	27.5	377.8	312.1
County Life	50.0	39.0	612.0	463.0
D/Magazine, Dallas/Ft. Worth	164.0	156.5	1,456.9	1,401.3
Denver	45.1	49.2	444.6	443.2
Exclusively Yours,				
Wisconsin (15X)	78.0	77.9	889.9	921.0
Grand Rapids	46.0	52.5	617.2	520.5
Gulfshore Life (10X)	79.5	57.5	575.7	579.5
Honolulu	66.5	66.1	790.8	806.4
Houston City	100.0	92.0	903.4	873.8
Indianapolis	41.8	49.4	558.8	619.8
Kansas City	50.0	31.6	386.6	306.3
Long Island Life	36.0	30.0	432.0	355.0
Los Angeles	299.0	272.0	2,457.5	2,428.0
Louisiana Life (6X)	102.8	87.4	460.6	392.4
Madison	80.0	65.0	536.0	482.8
Miami/South Florida	137.0	98.7	1,080.6	1,048.8
Milwaukee	52.1	45.1	289.4	368.0
Minneapolis/St. Paul	124.2	97.6	1,038.0	932.3
Monthly Detroit	72.5	105.4	665.0	713.1
New Jersey Monthly	67.7	59.3	649.0	675.9
New Mexico	38.1	41.6	332.0	387.3
Ohio	52.1	45.9	609.8	518.0
Oregon E	41.7	19.4	304.7	243.7
Orlando	75.8	67.0	902.7	821.0
Palm Beach Life	114.2	87.7	517.9	515.4
Palm Springs Life	131.6	100.0	1,472.1	1,437.9
Philadelphia	175.7	159.9	1,611.6	1,571.0
Phoenix	97.0	92.7	952.6	968.0
Pittsburgh F	85.6	59.1	754.7	610.1
St. Louis	90.3	82.5	727.3	789.7
San Diego	176.3	142.9	1,672.5	1,563.7
San Francisco	90.6	73.5	748.0	625.4
San Francisco Focus	56.0	52.8	588.8	483.8
Shenandoah/Va.				
Town&Country (6X)	—	—	285.2	222.6
Tampa Bay	42.5	—	346.6	—
Texas Monthly	151.7	160.5	1,504.0	1,601.8
Twin Cities	90.8	694.7	75.5	601.8
Washington Dossier	69.7	74.7	626.0	497.4
The Washingtonian	165.2	161.5	1,743.6	1,623.8
Total Group	**4,831.2**	**4,941.4**	**45,837.8**	**44,400.4**
% change		**-2.2%**		**+2.7%**
— Movie/romance/radio/tv —				
Macfadden's Women's Group				
Modern Romances	24.0	25.9	316.2	341.8
Secrets	24.0	25.9	316.2	341.8
True Confessions	24.0	25.9	317.2	355.5
True Experience	24.0	25.9	316.2	341.8
True Love	24.0	25.9	316.2	341.8
True Romance	24.0	25.9	316.2	341.8
Sterling Women's Group				
Daytime TV	27.5	30.3	353.3	365.0
Modern Screen	19.5	32.3	229.7	262.7
Movie Mirror (6X)	—	—	178.3	198.1
Soap Opera Stars	—	24.3	240.3	273.0
TV Movie Screen (6X)	—	—	126.6	166.5
TV Picture Life (6X)	—	—	113.9	198.7
Teen Beat (6X)	7.7	—	45.5	37.7
Total Group	**198.7**	**242.3**	**3,185.8**	**3,564.2**
% change		**-17.9%**		**-10.6%**
— Music/entertainment —				
American Film (10X)	43.5	33.5	343.0	316.8
Audio	67.3	48.4	663.3	439.9
Circus Magazine	41.2	31.5	360.8	359.3
Dance Magazine	74.9	77.6	753.2	744.4
Musician	73.0	68.0	780.0	678.0
Playbill	68.7	78.5	664.8	678.6
Record	23.3	7.5	142.0	83.8
Stereo Review	55.8	73.5	604.0	651.1
Total Group	**447.7**	**418.5**	**4,311.1**	**3,951.9**
% change		**+6.9%**		**+9.0%**
— Newspaper, Sun. magazines —				
Family Weekly A	42.6	68.6	816.9	885.6
Parade	41.6	70.5	758.4	808.9
Total Group	**84.2**	**139.1**	**1,575.3**	**1,694.5**
% change		**-39.4%**		**-7.0%**
— Outdoor & sport —				
Alaska	54.6	51.2	507.2	548.9
The American Handgunner (6X)	38.2	43.1	236.4	226.6
American Hunter	27.8	32.5	266.6	230.6
American Rifleman	22.0	22.9	347.1	379.5
Backpacker (6X)	—	—	310.7	276.9
Bass Master (8X) A	—	—	416.8	439.8
Bicycling (9X)	—	—	896.5	760.8
Field & Stream	66.4	62.5	1,023.7	925.3
Fins & Feathers A	27.4	17.9	469.1	416.2
Fishing World (6X)	—	—	225.8	194.9
Florida Sportsman	65.7	47.3	812.9	748.8
Flying	48.3	43.8	511.9	547.8
Fur-Fish-Game	21.9	28.8	287.4	327.2
Golf Digest	92.0	73.1	1,053.3	879.3
Golf Magazine	50.0	45.3	750.6	783.7
Guns	32.5	34.0	356.3	392.0
Guns & Ammo	38.5	49.0	593.3	622.2
Outdoor Life	50.4	41.4	844.9	808.2
Petersen's Hunting	26.2	40.5	478.4	490.7

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. D. 1983 figures include Buyer's Guide. E. December, 1983, and January, 1984, figures combined. F. 1983 figure includes 16-page insert. G. Combined issue in 1982. * All affiliated with Sunday Mag/Net, except Los Angeles Times Home Magazine and New York Times Magazine.

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ad linage

(Continued from Page 35)

	Current month 1983	1982	Year-to-date 1983	1982
The Runner	41.7	32.8	502.9	429.2
Runner's World (13X)	43.3	42.8	564.2	524.7
Salt Water Sportsman	38.2	39.0	632.8	651.4
Shooting Times	36.9	27.9	448.6	404.0
Ski (8X) A.	155.3	127.8	759.4	734.8
Skiing (7X)	166.8	138.5	883.4	786.5
Skin Diver	72.1	65.7	863.0	782.4
Southern Outdoors (8X)	—	—	379.8	379.3
Sport	50.7	42.8	503.4	487.3
Sports Afield	83.1	69.8	1,005.8	1,050.4
Tennis	66.3	51.5	924.1	759.2
Western Outdoors (10)	35.4	22.8	342.9	345.0
World Tennis	45.1	39.7	605.7	516.6
Total Group	**1,495.8**	**1,334.4**	**18,824.9**	**17,860.2**
% change		**+12.0%**		**+5.4%**

— Photography —

American Photographer	56.2	54.3	621.6	591.3
Petersen's Photographic	52.9	55.3	460.2	540.2
Popular Photography	113.3	139.4	1,336.5	1,561.6
Total Group	**222.4**	**249.0**	**2,418.3**	**2,693.1**
% change		**−10.6%**		**−10.2%**

— Religious —

BBI Jewish Monthly (10X)	22.4	26.8	243.2	256.9
Christian Herald	40.7	35.8	445.4	436.2
Christian Life	49.6	32.7	362.0	358.9
Christianity Today	32.0	23.5	733.8	776.9
Inside (4X)	—	—	293.1	282.4
Moody Monthly	52.3	43.3	575.7	568.7
Today's Christian Woman (4X)	70.7	49.0	215.0	160.0
Total Group	**267.7**	**213.1**	**2,868.2**	**2,840.0**
% change		**+25.6%**		**+0.9%**

— Science/electronic/mechanic —

Compute	215.1	145.6	1,790.8	1,205.3
Computers & Electronics	47.6	62.4	701.5	700.4
Creative Computing	197.3	244.9	2,143.7	1,681.7
Discover	45.9	60.3	508.5	441.6
Electronic Games	66.7	63.0	564.7	252.6
Mechanix Illustrated	59.5	61.1	835.8	791.7
Omni	82.5	83.2	814.1	726.8
Personal Computing	221.4	205.5	2,426.6	1,858.0
Popular Mechanics	66.3	83.1	1,186.1	1,205.2
Popular Science	97.7	77.6	1,063.0	989.5
Science Digest	50.1	29.6	424.6	329.8
Science 83 (10X)	48.5	40.9	414.4	389.6
Scientific American	75.8	80.8	749.2	911.1
Spectrum	84.3	53.7	1,042.6	829.3
Total Group	**1,380.7**	**1,291.7**	**14,664.6**	**12,292.6**
% change		**+6.8%**		**+19.2%**

— Women/fashion/service —

Bride's Magazine (6X) A.	—	—	1,819.2	1,675.2
Cosmopolitan A.	221.4	195.2	2,464.1	2,289.3
Essence	86.0	73.7	966.7	935.3
Family Circle A.	122.8	121.2	1,789.8	1,694.0
Glamour	149.0	128.5	2,031.6	1,885.6
Good Housekeeping A.	207.3	165.9	2,096.0	2,014.8
Handmade (4X)	—	—	117.9	118.5
Harper's Bazaar	118.9	118.9	1,558.3	1,382.0
Health	—	—	—	—
Ladies' Home Journal	96.8	73.2	1,177.4	930.4
Ladycom	—	—	356.4	326.3
Lady's Circle	11.8	7.9	105.0	115.2
Mademoiselle	98.5	107.8	1,573.6	1,525.4
McCall's	94.6	95.4	1,120.5	1,052.7
Modern Bride (6X)	—	—	1,518.5	1,440.0
Ms	—	—	—	—
New Woman	39.7	39.5	564.3	485.5
Parents Magazine A.	74.2	65.2	921.3	869.3
Playgirl	40.9	46.6	461.3	483.3
Redbook	102.7	76.8	1,102.1	1,049.4
Self	72.0	58.3	926.1	833.1
Seventeen	85.3	78.2	1,311.6	1,307.4
Soap Opera Digest	17.2	24.5	362.3	325.3
'Teen Magazine	46.6	34.3	650.0	555.6
True Story A.	57.5	50.8	692.3	706.0
Vogue	240.1	210.3	3,104.6	2,795.6
W Magazine	91.0	85.9	1,202.6	1,101.3
Weight Watchers	25.0	25.1	333.9	343.4
Woman's Day A.	138.6	97.8	1,604.2	1,464.6
The Workbasket (10X)	—	—	397.3	395.1
Working Mother	63.1	74.5	855.1	848.3
Working Woman	94.0	94.0	1,184.7	1,016.9
Total Group	**2,415.0**	**2,149.5**	**34,370.7**	**31,954.8**
% change		**+12.3%**		**+7.5%**

— Youth —

Boys' Life	20.6	31.5	278.0	263.8
Campus Life	30.6	34.2	438.6	470.7
Total Group	**51.2**	**65.7**	**716.6**	**734.5**
% change		**−22.0%**		**−2.4%**

November

	Current month 1983	1982	Year-to-date 1983	1982

— Business —

Atlanta Bus. Chronicle (52X)	49.4	31.2	361.2	291.6
Barron's (52X)	229.5	230.5	2,275.8	1,922.3
Black Enterprise	49.7	60.3	656.7	562.4
Boston Bus. Journal	80.3	70.3	720.7	459.7
Business Week (52X) A.	512.1	463.6	4,224.3	4,052.7
California Business	89.6	83.9	821.6	805.9
Capital District Bus. Review	33.6	28.8	398.6	337.8
Corporate Report/Kansas City	59.8	60.7	571.2	589.9
Corporate Report/Minnesota	96.6	94.8	866.9	895.9
Crain's Chicago Bus. (52X)	159.4	167.0	1,408.5	1,220.4
Crain's Cleveland Bus.	63.4	66.3	574.5	416.9
Dallas/Ft. Worth Bus. (52X)	44.9	51.2	433.9	459.3
Dun's Business Month	91.4	71.8	725.2	751.3
The Executive	121.8	80.4	993.1	999.0
Financial World (24X)	55.0	30.9	410.3	505.3
Florida Trend	81.4	59.9	827.0	742.3
Forbes (26X)	429.9	348.0	3,036.4	2,681.7
Fortune (26X) A.	355.1	374.3	2,955.8	2,488.7
Frequent Flyer	67.4	60.6	531.8	378.3
Hawaii Business	52.4	38.0	532.6	451.7
High Technology G.	37.9	61.1	318.4	275.5
Houston Bus. Journal (52X)	156.0	204.2	1,670.8	2,003.9
Inc. Magazine A.	149.5	118.8	1,179.8	960.6
Income Opportunities (10X)	51.4	41.5	450.4	425.4
Industry Week (26X) A.	131.5	128.5	1,162.4	1,231.7
Indianapolis Business Journal	93.4	101.7	956.0	789.7
Nation's Business A.	45.9	36.9	312.0	387.4
New England Bus. (20X) B.	66.7	60.2	738.2	666.6
New Orleans Citibusiness (26X)	110.8	103.0	1,199.2	840.0
Pacific Business News (52X)	116.3	109.1	1,111.7	1,012.2
Philadelphia Bus. Journal	61.7	44.8	740.0	338.6
Pittsburgh Bus. Times (52X)	68.3	61.0	596.0	494.0
St. Louis Business Journal	100.2	110.3	1,185.3	1,056.8
Texas Business	76.3	49.8	718.7	586.5
Venture	126.4	60.6	716.7	429.9
Total Group	**4,136.5**	**3,777.7**	**35,659.2**	**32,711.1**
% change		**+9.4%**		**+9.0%**

— Newspaper Sunday magazines* —

Arizona Republic	73.0	123.3	711.3	1,054.9
Boston Globe	289.2	289.4	2,102.8	1,990.1
Chicago Tribune	121.5	132.9	949.3	1,077.2
Cincinnati Enquirer	104.7	97.6	840.7	994.5
Cleveland Plain Dealer	91.5	94.3	928.4	875.0
Columbus Dispatch	58.6	55.7	516.5	586.2
Dallas Times Herald	68.0	75.8	833.9	805.0
Denver Post	192.9	263.2	1,292.5	1,469.5
Detroit News	90.5	91.0	993.1	1,061.2
L.A. Times Home Magazine	137.3	103.0	1,070.2	1,086.7
Louisville Courier-Journal	113.9	106.9	967.4	1,066.9
Miami Herald	55.1	66.8	581.7	670.2
New York News	51.8	49.8	640.9	612.3
New York Times Magazine	450.9	413.0	3,882.9	3,788.9
Philadelphia Inquirer	69.5	67.5	629.6	702.4
Toledo Blade Magazine	49.5	49.2	497.7	505.5
Washington Post	129.2	132.3	1,233.2	1,309.8
Total Group	**2,147.1**	**2,211.7**	**18,672.1**	**19,656.3**
% change		**−2.9%**		**−5.0%**

— Weeklies/bi-weeklies —

The Advocate (25X)	119.3	97.1	1,186.0	918.6
Army Times Military Group:				
Air Force Times (52X)	178.4	213.1	1,633.8	1,632.6
Army Times (52X)	175.0	204.1	1,604.0	1,598.8
Navy Times (52X)	193.9	234.7	1,805.4	1,890.2
The Times Magazine	12.5	15.3	156.4	164.6
The Blood-Horse (52X)	1,946.2	1,941.3	6,605.7	6,490.1
Capper's Weekly (26X)	23.6	25.2	290.0	271.3
Commonweal (22X)	12.9	8.6	73.6	78.2
Golf World (43X)	35.2	35.8	812.2	739.6
Grit (52X) A.	26.4	24.1	284.1	288.9
National Review	44.1	43.5	353.9	328.8
New Republic (48X)	48.9	47.7	374.5	347.2
New York Magazine (50X)	305.4	252.0	2,569.0	2,232.3
New Yorker (52X)	507.6	538.7	3,303.3	3,573.8
Newsweek (52X) A.	394.3	414.5	2,677.7	2,591.8
People (52X)	445.0	456.1	3,080.9	3,197.4
Rolling Stone (25X)	102.4	100.1	1,031.0	980.2
Sporting News (52X)	55.1	74.7	621.7	605.9
Sports Illustrated (52X) A.	267.8	324.4	2,548.6	2,486.2
Time (52X) A.	291.9	371.0	2,483.6	2,433.0
Travelhost (52X) C.	2,963.0	2,764.0	32,317.0	28,200.0
TV Guide (52X) A.	383.4	355.4	3,341.3	3,400.3
Us Magazine (26X)	45.7	48.2	495.4	529.9
U.S. News &				
World Report (52X) A.	195.1	221.7	1,626.0	1,600.4
Total Group	**8,773.1**	**8,811.3**	**71,275.1**	**66,580.1**
% change		**−0.4%**		**+7.0%**

— Foreign —

Buenhogar:				
Central America	5.0	5.0	23.0	43.5
Chile	3.0	3.5	16.0	18.8
Colombia	85.5	77.2	459.3	646.8
Dominican Republic	23.3	7.5	139.8	143.0
Ecuador	27.0	16.2	131.5	142.2
Mexico	111.0	80.0	514.0	669.5
Peru	50.8	44.3	275.2	384.2
Puerto Rico	28.5	22.0	147.7	202.5
U.S.	13.0	11.7	126.5	81.2
Venezuela	45.0	78.5	252.7	463.8
Coqueta:				
Central America	—	—	—	5.0
Colombia	5.0	2.5	30.5	43.0
Mexico	9.5	5.0	32.5	67.8
Peru	—	—	—	5.0
Puerto Rico	1.3	1.0	4.3	17.0
Venezuela	4.0	8.5	30.0	64.0
Geomundo:				
Central America	9.0	10.0	57.0	75.0
Chile	6.0	14.0	54.0	87.0
Colombia	15.0	35.0	120.5	182.8
Ecuador	4.0	9.0	44.0	58.0
Mexico	14.0	16.0	77.5	147.7
Peru	7.0	13.0	70.0	103.5
Puerto Rico	7.0	13.0	45.0	85.0
Venezuela	42.5	29.0	144.2	194.0
Hombre De Mundo:				
Central America	11.0	11.8	65.3	65.7
Chile	11.0	12.5	67.0	65.5
Colombia	23.5	22.5	129.5	159.7
Ecuador	11.0	9.0	66.0	54.8
Mexico	33.7	34.0	161.5	233.3
Peru	12.0	11.0	68.0	75.8
Puerto Rico	12.0	17.5	71.3	100.3
Venezuela	16.5	40.3	153.8	328.8
Ideas Para Su Hogar:				
Central America	1.0	3.0	3.0	9.0
Chile	1.0	2.0	1.0	10.0
Colombia	64.0	73.0	318.5	413.7
Ecuador	6.5	11.0	40.5	84.7
Mexico	17.8	42.0	153.2	270.8
Peru	28.0	30.3	120.2	157.8
Puerto Rico	0.3	3.3	6.3	20.8
Venezuela	23.2	55.7	148.3	306.7
Intimidades:				
Central America	—	1.0	—	17.0
Chile	—	1.0	5.5	6.5
Colombia	1.5	1.0	9.5	17.0
Mexico	2.5	4.0	22.0	50.5
Puerto Rico	—	2.0	6.2	29.0
Venezuela	3.5	6.5	42.5	63.0
Mecanica Popular:				
Argentina	7.2	11.2	80.3	100.5
Central America	17.2	17.7	141.8	192.3
Chile	7.5	11.5	71.2	78.5
Colombia	22.8	28.7	193.5	256.5
Mexico	13.0	22.7	106.7	249.5
Peru	24.7	28.2	225.2	279.5
Puerto Rico	18.5	16.8	164.7	176.0
Venezuela	20.0	26.5	222.0	288.8
The Ring en Espanol:				
Mexico	—	1.0	—	16.0
Puerto Rico	—	4.0	—	41.5
U.S.	5.3	5.0	38.5	50.5
Venezuela	—	2.0	7.0	33.0
Vanidades Continental:				
Central America	15.3	18.3	85.5	172.7
Chile	2.0	16.3	33.5	150.2
Colombia	101.2	144.5	739.7	1,040.7
Dominican Republic	27.0	28.5	203.0	306.7
Ecuador	20.8	27.0	147.0	247.0
Mexico	196.7	179.7	1,152.2	1,339.8
Peru	44.7	68.0	331.2	514.8
Puerto Rico	53.7	69.3	385.2	496.2
U.S.	51.7	66.3	507.0	593.5
Venezuela	55.2	125.7	483.5	925.5
Business Week Int'l.	229.0	275.1	1,698.3	2,095.8
Cosmopolitan Foreign Editions:				
Australia	104.8	140.9	742.4	775.7
Brazil	68.0	64.0	508.2	571.6
France	126.3	114.9	1,067.5	1,124.5
Germany	103.7	54.7	668.8	300.8
Great Britain	172.0	178.0	1,266.9	1,281.0
Greece	90.0	100.0	565.0	616.0
Holland	66.0	62.0	482.5	272.0
Italy	94.0	135.0	758.0	852.7
Japan	44.7	55.0	425.0	411.6
Cosmopolitan en Espanol:				
Central America	5.5	6.3	26.3	41.5
Colombia	36.2	28.7	175.7	232.0
Ecuador	4.5	5.8	12.5	33.7
Mexico	118.8	104.7	664.5	764.2
Peru	15.5	22.3	80.5	154.7
Puerto Rico	40.5	36.2	230.3	288.0
U.S. (Spanish language)	27.3	20.5	206.2	203.2
Venezuela	30.3	54.7	157.0	325.5
International Communications:				
African Business	38.2	24.0	331.4	329.0
New African	15.7	38.0	206.5	269.3
The Middle East	24.2	29.0	284.7	254.4
International Herald Tribune	113.9	105.3	976.9	917.2
International Management:				
Africa	14.3	13.7	174.5	152.5
Europe	62.7	56.8	466.8	458.7
Latin America	13.0	17.2	138.0	150.7
Middle East	27.7	21.0	256.5	228.2
Pacific	17.3	18.7	170.3	189.2
Johnston International:				
Alam Attijarat	56.0	57.3	671.0	775.4
Ejecutivo	25.5	24.2	99.5	140.6
Modern Africa	23.0	25.2	141.4	201.3
Modern Asia	39.2	41.8	391.2	398.4
Newsweek International-A:				
Atlantic	136.9	145.4	1,051.8	1,043.4
Latin America	32.0	41.7	332.7	335.6
Pacific	104.1	104.8	815.1	835.1
Progreso (9X)	11.8	10.6	102.3	135.3
Reader's Digest:				
Arabic	17.5	19.5	145.0	154.5
Asian	322.5	255.0	2,508.3	2,020.0
Australian	125.3	101.2	802.0	855.0
Belgian-Flemish	162.5	130.5	945.5	879.0
Belgian-French	123.0	106.0	709.0	699.0
British	98.6	108.1	685.0	696.6
Chinese-B	169.5	133.0	1,223.8	1,061.0
Danish	44.5	57.8	374.2	372.1
Dutch	57.0	61.8	395.1	490.5
Finnish	56.0	76.0	721.0	584.6
French	81.6	125.4	626.2	789.5
German	122.1	95.8	823.6	802.1
Greek	—	—	11.5	99.5
Iberian	19.5	33.0	193.0	304.5
Indian-English	77.0	121.5	790.8	929.5
Indian-Hindi	—	11.5	44.5	168.5
Italian	66.5	107.0	521.5	658.5
Japanese	48.9	57.3	537.9	529.5
Korean	31.0	20.8	236.2	222.5
Latin American:				
Argentina	23.5	22.0	173.5	195.5
Brazil	8.0	19.5	93.5	140.3
Central American	15.0	22.0	129.5	165.0
Chile	11.5	31.0	168.0	235.0
Colombia	47.0	88.0	394.0	542.0
Ecuador	14.0	20.0	123.0	150.0
Mexico	71.2	74.4	519.2	662.4
Peru	18.0	21.0	119.5	153.5
Puerto Rico	14.0	15.0	77.5	141.5
U.P.B.	14.0	21.0	117.5	182.5
U.S. Spanish	18.5	18.5	158.0	177.5
Venezuela	17.5	36.0	159.0	259.5
New Zealand	113.0	121.5	971.8	820.0
Norwegian	66.3	56.3	448.1	502.2
Portugal	70.0	80.0	503.6	492.1
South African	161.0	176.0	1,136.0	1,305.0
Swedish	27.0	18.3	225.0	279.8
Swiss-French	41.0	59.0	329.0	374.5
Swiss-German	55.3	72.0	420.3	470.8
Time International:				
Time-Asia	125.3	146.4	1,128.2	1,122.1
Time-Atlantic	173.1	164.3	1,253.5	1,197.3
Time-Canada	271.6	263.2	1,778.5	1,751.6
Time-Latin America	76.9	112.1	556.1	777.0
Time-South Pacific	207.6	237.0	1,521.1	1,744.8
Visao (52X)	160.3	243.3	1,878.8	1,900.6
Vision/Latin America (26X) A.	48.2	55.3	344.0	436.0
Total Group	**7,384.3**	**8,122.9**	**56,572.9**	**61,475.0**
% change		**−9.3%**		**−7.9%**

Flexibility a plus, exec says

By SARAH STIANSEN

DALLAS—Advertisers with the most flexibility in their media mix will fare the best in the coming year, according to Hugh O'Brien, senior vp-director of media for Bozell & Jacobs/Southwest.

Factors influencing the media picture in the year ahead will include a tightening of broadcast advertising availability due to the Winter and Summer Olympics and political advertising, Mr. O'Brien said at a media outlook news conference here.

Summer will be particularly tight, he says, because of the summer games and national political conventions, providing networks with a better chance than they've had in the past to do well in the scatter sales market.

Mr. O'Brien also sees a "dramatic growth in radio, both local and national," and points to many advertisers that have rediscovered the effectiveness of the medium.

However, he sees slowed growth in the startup of radio networks.

Fm continues to be strong, according to agency research, with 62.3% of listeners.

Prices will increase 9% and 8% for spot and network radio, respectively, he predicts. The highest predicted cost increase will be in spot tv, with an 11% increase from year-earlier costs, followed by nighttime network tv, with a 10% jump in prices. Increases for other media should all be less than 9%, he says.

Those cost increases, Mr. O'Brien says, represent a "good news, bad news" situation for advertisers. While price increases are still higher than the rise in consumer prices, they are lower than the double-digit increases the industry has seen in recent years.

While predicting increasing fragmentation of audiences for all media, Mr. O'Brien points to several positive effects of growing competition.

He sees the newspaper category benefiting from the launch of *USA Today*, which has caused many papers to improve color, introduce special sections and consider satellite transmission of news.

He also points to more aggressive marketing by the newspaper industry, the repositioning of many of the women's service magazines and networks' "awakening" to the cable challenge, planning their programing more competitively.

For the networks, he says, we will see more experimentation but also more stability. He mentioned increases in game shows on daytime tv, miniseries and made-for-tv movies as examples.

For cable tv, Mr. O'Brien sticks by what he calls Bozell & Jacobs' "revisionist" philosophy. While cable has not provided the programing breakthroughs once expected, it is viable for advertisers, although he sees a "massive shakeout" in services.

Local cable could be a growth area, especially for retailers, which he says are becoming more sophisticated in their choice of media.#

Living it up

Spiegel Inc. continues to aim for the coveted affluent audience with a new $1.5 million ad campaign beginning this month in fashion and home furnishings magazines such as *Glamour*, *Town & Country* and *Vogue*. Marsteller Inc., Chicago, handles.

First-quarter growth for spot tv ads in limbo

By JAMES P. FORKAN

NEW YORK—The beauty of national spot tv's first-quarter growth appears to be in the eye of the beholder.

Some broadcast executives at a financial seminar thought the quarter's spot tv increase might not be as strong as expected as recently as last month, while other executives saw no blemishes ahead.

Blair Television, the No. 1 national tv sales representative, expressed satisfaction with its sales bookings so far and was "reasonably optimistic" about a healthy quarter and year ahead.

Roger Rice, Television Bureau of Advertising's president, when asked if the spot picture looked softer than expected, replied, "Oh no! First quarter's taking off."

ABC stations probably will jump by 20% in first-quarter business, Mr. Rice figured, while the other stations should see gains of about 14% over the first quarter in '83.

At Blair Television, Jim Kelly, senior vp, said its orders are "running nicely ahead, say 12% to 14%," for the first quarter.

TvB projections for full-year 1984 a few weeks ago stood about 16% for national spot (AA, Nov. 21), but that could be lowered to about 14%, Mr. Kelly said. The slow fourth-quarter scatter sales pace and spot business may "dampen" the initial quarter somewhat, chiefly in prime time, he said, since the networks' daytime, early-morning and late-night dayparts are "tight."

Among Blair's bookings for the initial quarter, Mr. Kelly disclosed, are "pretty big spot buys" by the automotive, package goods and fast-food categories, with airlines and the phone companies also offering promising signs.

Videogames have been "off all year" in tv spending, so "there'll probably be no influx" in the first quarter, by which time these marketers "generally have shot their wad" in any case, the senior vp said.

The home computer companies, however, may be active spot buyers, he added, citing Coleco Industries, which has placed orders for its Adam computers, and International Business Machines, which probably will be a "heavy" first-quarter client, for its PCjr.

At the media outlook conference staged by Paine Webber Mitchell Hutchins here early last week, a broadcast panel indicated that the spot marketplace would be softer than expected.

"In recent weeks, tv broadcasters have lowered their estimates of over-all [spot] revenue increases for all 1984 to an average of 12%," down from the earlier projected 14% or better gain, one panelist, James T. Lynagh, president, Multimedia Broadcasting, Cincinnati, said.

Another panelist, John J. McCrory, Greenwich, Conn.-based president of Times Mirror Broadcasting, when contacted several days after the conference, said the "dramatically eroded" network market in the '83 final quarter has caused many broadcasters to become "more conservative."

Indicating that not only Blair but Katz Communications, Petry Television, Harrington, Righter & Parsons and others already are enjoying strong first quarters, Mr. Rice said the broadcasters at the Paine Webber session were "corporate broadcast people" and thus "not as up to date" on a nationwide basis as the national sales reps.

The TvB executive remained confident that 1984 "is going to be a strong year" for tv in general, although he said there are "wide swings" in sales performance from one market or region to another, as well as between network affiliates and independents.

Another group owner with stations across the U.S. said the failure by the tv networks to sell much of their fourth-quarter inventory (AA, Nov. 7, *et seq.*) has hurt spot business, since clients historically address their spot buying after network business is set.

An ADVERTISING AGE panel on the '84 outlook foresaw "extraordinary demand" for spot tv due to political spending and to the Olympics sharply cutting network tv availabilities (AA, Nov. 7). But according to this group owner, the Olympics and political advertising may not be as big a plus for local stations as originally thought.

Many accounts are staying away from the non-ABC affiliates during the Winter and Summer Olympics coverage, especially in prime time, he said, noting that their rationale is that "maybe it's a good idea to hold back those dollars till after the Olympics."

As for political spending, this executive said the local campaign spending generally brings in more dollars to the stations than does the presidential campaign.

David Poltrack, vp-research, CBS/Broadcast Group, said that from the networks' perspective, the outlook is "still fairly bullish."

Full-year 1984 should find network volume up 12.5% to 13%, with another 2% to 3% owing to the Olympics, he added.#

Ad spending seen climbing 13.8%

(Continued from Page 3)

and other local media advertising increased 13.2% to $11.1 billion. In total, local and national media spending was up 12.7% to $75.1 billion.

For the third straight year, the gross national product has continued its surge, increasing 7.8% in 1983, and Mr. Coen forecasts it will be up another 10% next year.

Ad growth was 12.7% in '83, and Mr. Coen hedged on '84, confessing he is not convinced advertising will outpace the economy again.

Comparing the first nine months of '83 to the same period in '82, Mr. Coen found both automobile and restaurant (i.e., fast-food chains) advertising was up 21% in the three media (network and spot tv and magazines).

Food and toiletry advertising in network tv, spot tv and magazines was up 7%; drug/remedies up 13%; cleaners/waxes up 8%, and candy/soft drinks up 10%.

While Mr. Coen does not expect automobile spending to increase another 21% in 1984, he does predict continued strong growth in all the other categories.

Of the secondary product categories, Mr. Coen found cigaret (magazine) advertising was up 20%, apparel (network tv and magazines) up 21%, beer up 18%, pet foods up 5% and insurance up 18%, while liquor dropped 13% and oil companies declined 17%.

"Liquor has been dropping for a couple of years," Mr. Coen said, adding that the liquor business has been badly affected by the economy. "It should show some improvement next year," he added.

For the first year, Mr. Coen presented a separate slide on cable tv. "I am just starting to see big numbers and to see cable starting to siphon some money off the networks," he said. "It is begining to be a source of dissolution."

Mr. Coen found, for the first nine months of '83, cable ad revenues were up $169 million, a 55% increase over the same period in '82. For the year, he expects it to be up to $250 million, as compared with $164 million in 1982. And he predicts yet another 20% to 25% gain in 1984.

In a study of spending patterns in election and Olympic years, Mr. Coen has found the networks profit heavily from the events. For instance, in 1980, in spite of the U.S. boycott of the Moscow Olympics and the recession, network tv spending was still up 11.5%. That year, spot tv was up 13.8%, local tv up 10.6%, spot radio up 17.1% and local radio up 10.3%.

Advertising in magazines has turned around. Magazine ad pages in the first 10 months of 1983 have been up 8% as opposed to the first 10 months of '82. "There is a lot of potential ad growth next year," Mr. Coen said.

A longtime watcher of the surge in direct mail, Mr. Coen saw that growth rate dip to 8.3% in the first half of 1983 from 9.6% in the same period a year earlier. But that backslide is temporary, he said.

Newspaper growth was slight in the first three months of 1983—up a mere 1%, flat but better than the same period in '82, when it was down 3%.

He predicts steady growth in retail linage—it "is going to start taking off," Mr. Coen said. "That will be the biggest volume gain of any category except classified." Classified linage was up 11% in the first nine months, compared with a loss of 5% in the same period of '82.

Taking an international look at ad spending, the U.S. is up 13% in '83 over '82; Japan is up 7%; Germany is up 5%; France is up 9%; the U.K. and Canada each are up 11%, and Italy is up 27%. While U.S. ad spending will increase to $85.4 million in '84, the rest of the world will be up 11.2% to $66.7 million.

Mr. Coen also explained how media availability in international countries is starting to expand, i.e., in Sweden with advertising on videocassettes, in France on free radio and regional tv, in Germany in a cable tv test and in the U.K. through a new satellite system, a second commercial channel and the expanded amount of programing in the early-morning hours.

Probably the greatest surge in commercial spending has come in Italy where private tv advertising has gone from $49 million in 1976 to $727 million in 1983.

In 1990, ad spending will be up to $147 billion in the U.S. and $140 billion for the rest of the world. The trend to bigger and better media budgets continues.#

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